C2710-1

$1.25 a copy; $52 a year

Monday, December 3, 1984

Advertising Age

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Carl Spielvogel

On a 'personal service' course

'Benevolent Dictator' interview—See Page 34

NEWSPAPER

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P&G rethinks media-buying strategies—net tv losing

— Page 1

Hitler 'diary' aftershocks shake future for 'Stern'

— Page 1

Agencies like the looks of controversial U.S. tax plan

— Page 3

Global media: A revolution is unfurling in world arena

— Special international section

Morris collared for new drive

By RUTH STROUD

TERMINAL ISLAND, CAL.—Star-Kist Foods has Morris the cat on the prowl again, this time in a $20 million campaign—its largest ever—for two new cat food lines, breaking nationally in April.

It was the finicky feline that helped turn Star-Kist Foods' 9-Lives canned cat food into the dominant brand in the $1.9 billion cat food category. Now Star-Kist is making a more aggressive effort to capture a larger share of the other two segments of the category—soft moist and dry cat foods.

The H.J. Heinz Co. subsidiary is putting the big push—about double what it has spent annually on its 9-Lives brand—behind the introduction of 9-Lives Tender Meals semimoist cat food and 9-Lives Crunchy Meals dry food products. The company, which claims it accounts for one-third of all canned cat food sold, believes these two other segments, which have an annual dollar volume of nearly $1 billion, represent its strongest opportunities for growth in cat food.

Star-Kist already had semimoist and dry items under the 9-Lives name. It apparently plans to absorb these into the new lines. Morris never was used to promote them. Sylvester the Cat, the Warner Bros. cartoon character, appeared on the packaging and in tv spots.

In addition to the media spending, Star-Kist plans an intensive $10

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Shulton touts new format for tv spots

By PAT SLOAN

NEW YORK—During the next three weeks, American Cyanamid's Shulton USA division will try to sell the tv networks and major syndicators on five 30-second and 60-second pilot vignettes that would air as lead-ins to commercials for Shulton's women's brands.

Shulton's sales pitch comes as the company, best known for its Old Spice men's products, is trying to increase its appeal to women because of its growing number of women's products, said Jim Gibbs, advertising services director, Shulton USA, Lederle Labs and Jacqueline Cochran Inc.

Shulton, which has introduced Ladies Choice antiperspirant and is adding a styling mousse to its Breck haircare line, also is testing two women's skincare products, Equa-Balance and SanSoucis. But the vignettes, Mr. Gibbs said, also could be used before commercials for Lederle's Centrum vitamins or even some of Cochran's fragrances.

The vignettes, created by Sister's Arts and consultant Darren Kloomack, are not informational but dramatic/comedic soliloquies of women's concerns, such as food binging, reentry into the work force and childbearing versus career choice. At the conclusion of each monolog, a bridge line such as "Intimacies from Ladies Choice" or "Intimacies from Centrum" is used to segue into the appropriate commercial.

Mr. Gibbs said Shulton tried a similar 60-second concept three years ago, called "Portrait of a Woman," but "we never sold anyone on running them."

Mr. Gibbs believes the concept is valid based on the strength of similar sports fillers, such as Seventh Inning Stretch, for the men's market.

With the Intimacies program, Shulton would pay for the production costs of each filler, which came to about $7,000 each, plus the following 30-second commercials. It would be left to the network or syndicator to create time for the "Intimacies" spots, either by using the spot as a filler or taking a minute out of another program.

Given that, Mr. Gibbs is fully aware "that we will have to buy our way in to make them interested. If everyone isn't happy, this won't go. Everyone has to

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Highlights

G. Heileman Brewing, La Crosse, Wis., is introducing nationally Black Label 11-11 Malt Liquor. The new brand is Heileman's fourth entry in the category. *See Page 10.*

Benevolent Dictator Carl Spielvogel turned his experience working for the *New York Times* into a job at McCann-Erickson and Interpublic Group of Cos. He now is chairman-chief executive officer of Backer & Spielvogel. *See Page 34.*

"Rome wasn't built in a day," says William O'Neil, founder of *Investor's Daily*, and that's the philosophy he's following in building circulation and respect for his new publication. *See Page 62.*

Even as Lee Iacocca still is turning on his considerable public charm in Chrysler Corp. ads, the current architect of the new Chrysler corporate image is pondering how to follow that act after the flamboyant chairman leaves. *See Page 80.*

Defying traditional wisdom that summer is the best time to sell, imported beer marketers are resorting to heavy media spending to get their high-brow brews into the hands of holiday celebrants. Meanwhile, Anheuser-Busch and White Rock Products are responding to concerns about holiday overindulgence by promoting low or no-alcohol beers. *See Page 86.*

Computerized desk-organizer marketers are clamoring for attention from a potentially huge business market. *See Page 88.*

Control Data Corp., a computer services marketer, claims it has a remedy for profit-conscious consumer-product brand managers who can never get enough numbers to crunch from their ad agencies. *See Page 88.*

Cover photo by Arnold Adler.

CORPORATE CLOSEUP

Success and ambition are firmly established attributes at National Convenience Stores, which owns and operates 1,100 convenience stores. *See Page 4.*

FORUM

Hal Katz, exec vp of Vitt Media International, urges advertisers to challenge their ad agencies on media decisions. *See Page 16.*

Kenneth Brown, a public policy researcher, says that the revolution in communications and computers is yet to come. *See Page 16.*

VIDEOTECH

Bristol-Myers Co. is sponsoring a one-hour Easter special on ABC Television starring Martin Sheen and Alan Arkin that is being produced by Paulist Productions, an independent not-for profit company with ties to the Paulist Order of the Catholic church. *See Page 69.*

A new service that for the first time will provide cable operators with extensive demographic information about nonsubscribers in their franchise areas will be marketed next week. It should be a boon for operators. *See Page 70.*

COMING THURSDAY

SPECIAL REPORT

The promise of local programing, local access and local advertising has been elusive in some markets, but in others cable is almost living up to its various expectations.

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Vol. 55, No. 82—ADVERTISING AGE (ISSN 0001-8899) is published twice weekly except three times a week the last week in March, the second week in September and except once a week the third week in November and the fourth week in December at 740 Rush Street, Chicago, IL 60611. Second-class postage paid at Chicago and additional mailing offices. Send address changes to ADVERTISING AGE, Circulation Department, 740 Rush Street, Chicago, IL 60611. Microfilm copies are available from University Microfilms, 300 N. Zeeb Rd., Ann Arbor, Mich. 48103. Microfiche copies are available from Bell & Howell, Micro Photo Division, Old Mansfield Rd., Wooster, O. 44691.
$1.25 a copy, $52 a year, $95 two years. Add $99 per year for air delivery to Europe & Middle East. Add $31 for surface mail to all other foreign countries. WILLIAM STRONG, vp-circulation; ROGER DI GREGORIO, fulfillment director; HEIDI SCHULTZ, senior circulation manager. Four weeks' notice required for change of address. Address all subscription correspondence to circulation department, Advertising Age, 740 Rush St., Chicago, Ill. 60611 (312) 649-5200.

McGraw rewrites the book along marketing lines

By STUART J. ELLIOTT

NEW YORK—McGraw-Hill will reorganize $400 million worth of operations and recast its top executive lineup to redeploy itself along market rather than product lines.

The realignment, effective Jan. 1, cuts six line units to five operating units and creates three new executive posts. It is extensive enough that even a press release issued Nov. 29 characterized the changes as "sweeping."

In the most significant realignment, Donald Fruehling, 53, president, McGraw-Hill Book Co., will be promoted to a new corporate post, exec vp-publishing operations. Howard Hosbach, 53, president, Standard & Poor's, will become president, McGraw-Hill Financial & Economic Information Co., a new operating unit that combines two of the six old line units—S&P and Data Resources—and the recently acquired Monchik-Weber Corp. Joseph Kasputys, 48, who was Data Resources' president, will take a new corporate post, exec vp-development, and serve as the company's chief economist.

Among the important shifts on the organizational chart, Mr. Fruehling will report to Joseph Dionne, president-chief executive officer, McGraw-Hill, as will Mr. Hosbach, though his new post is an operating, not a corporate, post.

By moving into his new corporate post, Mr. Fruehling becomes a major player in McGraw-Hill's future. He will be the company's fourth exec vp, joining Mr. Kasputys; Brenton Harries, exec vp-corporate development, and John Cave, exec vp-chief financial officer. Industry analysts speculate this could put him in line for the presidency should Mr. Dionne be promoted to chairman when chair-

(Continued on Page 94)

NBC finds glory, too

Sweeps cheer CBS

By JAMES P. FORKAN

NEW YORK—When the November sweeps period ended last week CBS emerged easily as the victor, but NBC, still relishing its role as this season's spoiler, outpointed ABC.

The ratings period, which ended Nov. 27 in Arbitron's book, the following night in Nielsen's, found NBC as the only network to improve over the sweeps a year ago. ABC was hindered by its poorest November performance since 1968, and CBS suffered its first third-place finish during a regular season week since September '80 (AA, Nov. 29).

ABC's brightest spot came when the $4.5 million "Ewok Adventure" tv movie, co-produced by Lucasfilm, helped lift it to No. 2 for the week ended Nov. 25.

NBC, whose Nielsens in Weeks 8 and 9 were bolstered by the two-part "Fatal Vision" drama, boasted that its ratings were up about 5% compared with November '83. In contrast, CBS and ABC ratings declined by 10% and 15%, respectively.

CBS, hurt by "Vision," "Ewok," a two-hour "Love Boat" and its own unappealing Tuesday and Wednesday tv movies, is sticking by the view that weekly series are the backbone of long-term success. David Poltrack, CBS' vp-research,

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GLOBAL MEDIA

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A media revolution in the making

By DENNIS CHASE and KEVIN COTE

These two trends—the globalization of media and the globalization of markets—go hand in hand, and together they are changing the shape of our lives—Lee Huebner, publisher, *International Herald Tribune*.

From Hong Kong to Paris to New York, a melodrama is unfolding as media executives try to figure out what media globalization means for them.

What they are finding so far is that it is too soon to tell.

The term "global media" generally refers to those publications that have a substantial circulation on several continents, have global editorial content, are primarily in English and in which advertising in all editions can be purchased from one central office.

It differs from international media, which typically are indigenous publications shipped to foreign markets.

While global media has received most of the attention, so far advertiser interest has focused more on regional markets than global markets. For example:

- When the *IHT* started printing its newspaper in Asia in 1980, Mr. Huebner predicted that 50% of the newspaper's U.S. and European advertisers would add the Asian circulation onto Europe. Instead, 80% did.
- When *USA Today* started distributing in Europe a scaled-down, 16-page version of its U.S. edition, Vincent Spezzano, president of USA Today International Corp., expected to reach mostly U.S. tourists. Instead, he is finding that a surprising number of Europeans are buying the paper as well.
- When the *Wall Street Journal* launched its European edition in January, 1982, many observers predicted that a major circulation victim would be the *IHT*. Instead, the *IHT*'s circulation increased faster after the *Journal* arrived in Europe than it had before.

However, there are signs that the market for global media may burgeon at any time:

- When Rupert Murdoch purchased the pan-European tv channel, Sky Channel, many predicted the venture would fail because of language differences throughout Europe. Instead, Sky Channel executives were astonished to find that Europeans are so hungry for tv they will watch drama programs in English even if they don't speak the language.
- Several publications, including the *IHT*, *Financial Times* and *International Management*, are considering publishing U.S. editions. The main reason is to match the discounts being offered by competing media to advertisers who buy space in the U.S. edition and "add-on" foreign editions.

But for every global success, there is disarming news.

The number of U.S. advertisers placing global ads—which appear in every edition of the publication—is small. Both *Time* and *Newsweek* executives say only a few advertisers ran ads in nearly every edition this year.

Both newsweeklies are global publishing pioneers, but, ironically, are now creating regional editions for advertisers who want to pinpoint markets instead of going global.

Furthermore, the global market is unstable, even in the business-to-business category.

Bank ads, normally recession-proof, are off sharply this year because of bank failures and profit declines.

The strong U.S. dollar has wreaked havoc with global publications' media rate cards. Savvy advertisers consider arbitraging British pound sterling and Italian lira rate cards against U.S. rates that don't match and get "discounts." To keep up, media rate cards have to be changed often.

Tv, the logical mass medium for global consumer ads, has problems with a web of idiosyncratic government and cultural restrictions that have given advertisers, agencies and media executives nightmares.

In most countries, tv commercials are not afforded the same First Amendment-type protections that they receive in the U.S. The International Advertising Assn. next year will publish a major study showing that United Nations and other international charters guarantee protection.

So which advertising works globally? Corporate image and product advertising by financial institutions, aerospace and computer marketers, airlines, rental car companies and hotels are hot.

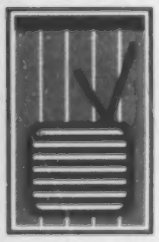
On tv, it seems sports, music and children's programing work worldwide, but advertiser sponsorship arrangements are complicated.

The best advice seems to be that of Lewis Young, president of Diebold Group, international management consultants, and former editor of *Business Week*:

"The trick," he told marketers recently, "is knowing what will work on a global basis—and don't push too hard."

The identity crisis that bedevils 'WorldPaper'

By MITCHELL LYNCH



BOSTON—Everything's just fine in Nigeria.

At least that's how *WorldPaper*'s local correspondent sees things in a dispatch from Lagos, the capital, where the new military government has launched a "war against indiscipline."

The generals are "restoring moral ethos and social values," the article goes on to say.

Some early results: "Rowdy public scenes are fast disappearing. Bus drivers rebuke passengers for rushing. Bank clerks admonish customers who cut in line."

And that's not all: Former politicians are routinely tossed into prison for terms running from 21 years to life.

Two newspaper reporters are sentenced to a year in prison and their paper, the *Guardian*, is fined $66,000 for "publishing false information."

Why, notes the article in obvious approval, even condemned armed robbers have reason for thanks under the new regime. "The trials are faster than before," it says.

The article is written by Abiodun Lewis, an associate editor at the *Guardian*, the Nigerian newspaper fined all that money, whose reporters were imprisoned.

What?

Is *WorldPaper* putting the reader on? Is this stuff tongue in cheek?

No, it's just another article in yet another monthly issue of *WorldPaper*, designed to be no less than "a newspaper for the global community."

Published in Boston, the newspaper supplement is dedicated to putting the world's events into perspective, thus creating better understanding and global harmony.

While at it, *WorldPaper* is out to make a buck, too.

But five years after it began publishing, *WorldPaper* seems to be having an identity crisis. The tabloid has had to lower the loftiness of its goals, and its circulation sights have shriveled from global to a scattering of 18 countries, mostly in the Third World. It has yet to penetrate and hold distribution in the U.S., Canada and Europe—except for Norway.

Its policy of having news covered only by local editors and reporters often causes far

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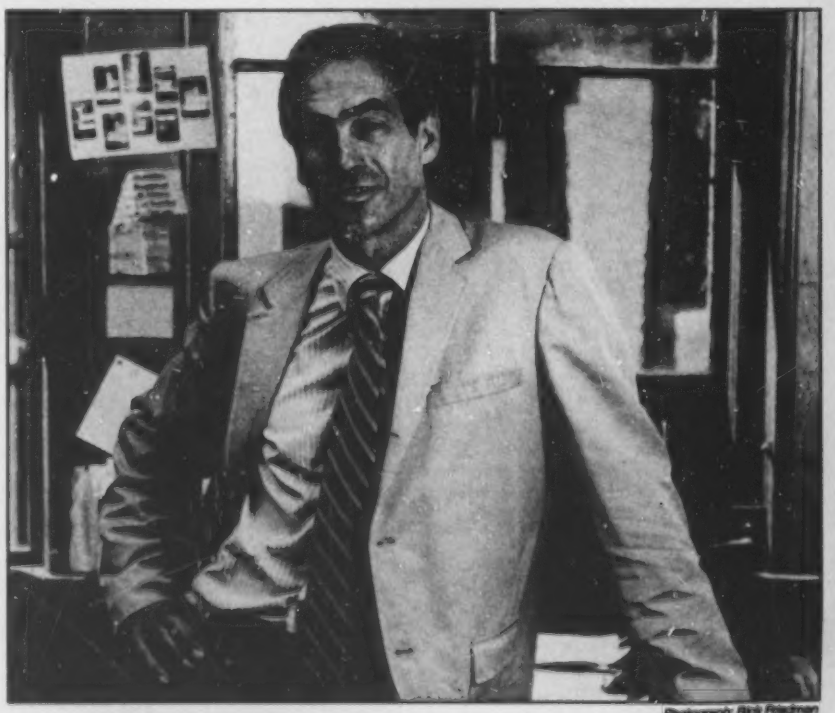
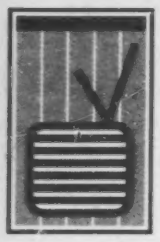


Photograph: Rick Friedman

Crocker Snow, *WorldPaper* publisher, says his newspaper is for the "global community," but circulation is limited and some critics say the publication lacks credibility.

Global media: How the giants cope



For global publications, battles in the boardrooms of the companies they cover are nothing compared to their own fights for the global advertising dollar. Like evenly matched boxers, the Wall Street Journal *goes up against the* Financial Times *and* International Herald Tribune; Business Week *takes on* Fortune *and* The Economist, *and* Time *and* Newsweek *export their U.S. battles internationally. Herewith our reports:*

'IHT' battles back against competition

By DENNIS CHASE

NEW YORK—There was a time when Europe was wide open territory for anyone aiming to become pan-European media, and advertisers had little choice but to do business with the only player in town, the *International Herald Tribune*.

But like the Wild West in the U.S., those days are long gone. They started eroding in earnest when the *Financial Times*, the leading financial newspaper in the U.K., launched a European edition in 1979. They took another blow when the *Wall Street Journal/Europe*, was launched in 1983, and now face the last roundup when *USA Today*, which is aiming for the expatriate and tourist end of the *Tribune's* readership, starts printing in Europe next year.

The new question that observers are asking is: Can the *IHT* maintain its position as the premier pan-European newspaper in the face of this onslaught?

"I don't see how the *IHT* can keep up [in Europe] unless it gives space away to advertisers," says Mike Wilson, *Wall Street Journal* advertising manager for North America.

IHT publisher Lee Huebner hotly disputes this. "It's like saying that the *Journal* in the U.S. competes for readers with the *New York Times*," he says. "It's not a zero-sum situation."

The fight for global readers and advertisers is not confined to Europe. Both the *Wall Street Journal* and *IHT* have major Asian editions, the *FT* is considering printing an Asian edition in 1986 and *USA Today* is also exploring Asia.

They are moving so quickly because initial growth can be rapid. Since the *WSJ/E* entered Europe 23 months ago, the *Journal* has increased its European circulation from 7,500 to 25,411 in about four years less time than it took to reach that figure in Asia. Advertising is averaging four pages an issue this year, up from three pages last year.

Executives at the *FT* also are happy with worldwide circulation that grew to over 215,000 this year, or 13% over 1981. Advertising volume is up 30% in pages this year over last, partially due to a 10-week printers' strike in 1983.

But the biggest surprise has been the *IHT's* resilience. The *Tribune's* circulation has grown 7% since 1983, to 157,560, including 4% growth in Europe, to 119,769, and 11% in Asia, to 24,103.

"Our fastest growth since 1967 has occurred since the *Journal* arrived in Europe," says Mr. Huebner. Advertising linage is up "slightly," he says, but adds, "We've looked at this campaign by campaign and found we have not lost any advertising to the *Journal*."

One reason may be positioning. The *Journal* constantly stresses the "quality" of its demographic profile, which surveys show is the "highest" in Europe, it says.

Conversely, the *IHT* stresses its broad appeal and bills itself as the "in-flight" newspaper because it is often given away by airlines.

However, all of those in the race for European and Asian readers have had to adjust to the new crowded marketplace, and several problems have emerged:

U.S. edition. Neither the *IHT* nor the *FT* prints in the U.S., which puts both publications at a major disadvantage to the *Journal*, the largest-selling newspaper in the world, largely because of its more than 2 million U.S. circulation.

IHT officials have considered distributing the paper in the U.S., concentrating on New York where the global ad community it is trying to reach will see it. "One of our big problems is that the people who advertise in the *IHT* don't read it every day," said Richard Morgan, *IHT* associate publisher.

The *FT*, with its 6,000 circulation receiving the publication days late in the U.S. now, likely will print a U.S. edition next year.

Add-ons. In the race to see who can offer the best discount and split-run deals to advertisers, all publications are looking to start new editions. Dow Jones is investigating a Latin American edition. The *IHT* has looked at—but is not now "actively" considering—offering advertisers in the *New York Times* and *Washington Post* (two of its owners) the opportunity of "adding on" the *IHT* at a discount.

Publisher Lee Huebner says the *IHT* is flourishing.

For the *FT*, "in the long term we want add-ons [in a U.S. edition], but what's the magic circulation number we need in the U.S. to get them—that's the question," said Laurance Allen, director of FT Publications in New York.

These add-ons can be a saving for advertisers. For example, the cost of a page this year in the *IHT's* Europe and Asia editions is $27,730, or 14% less than if an advertiser bought separately into each edition. Not surprisingly, 80% of all the *IHT's* advertisers buy a "global" ad, compared with a far smaller percentage at the *Journal*.

Tombstone ads. In the race for what had been a big advertiser category, the *IHT* has probably lost some "tombstone" ads—announcements that deals involving public shares have been completed—to the *Journal* and the *FT*. But those have been replaced by corporate and "personal finance" ads from brokerage houses, for example, so the *IHT* now gets only 20% of its ad revenues from financial ads, compared with 30% five years ago.

What will happen if tombstone ads stage a comeback, as some expect? The *IHT's* Mr. Huebner says tombstone ads are less important than in previous years, but the *Journal's* Mr. Wilson expects them to kick up and heighten the competition. "Let's face it, tombstone ads aren't going to run in seven different books," says Mr. Wilson.

News mix. As the only daily international newspaper that tailors its coverage to individual markets, the *Wall Street Journal* still is struggling to get the right mix of U.S. and foreign news.

In Asia, where *Journal*-type news is difficult to come by because most of the local press is government-controlled, the paper has been forced to run some stories from the U.S. edition that have only marginal interest in Asia.

"We still haven't figured out the right mix," admitted one *Journal* executive.

Dow Jones & Co. recently named Robert Keatley, former editor of the *Asian WSJ*, as the third editor of the *Wall Street Journal/Europe* in less than two years.

Mr. Keatley's plan is to increase the European content of the European *Journal* at the expense of some U.S. stories. This is sure to raise howls from many readers who complain they miss the U.S. coverage of the old international air edition, shipped from the U.S.

"We won't drop anything of significance, but there are many U.S. stories that just don't travel well," says Mr. Keatley.

The *IHT* also has added an "American Topics" column, to counter the *Journal's* U.S. coverage, and recently added a "Personal Finance" section, partly because advertising in this category is up 50% this year.

'Fortune' and 'BW' at global ad impasse

By KEVIN COTE

NEW YORK—*Business Week* and *Fortune* are finding the global marketplace is a little like the Tar Baby in the Uncle Remus stories: The harder you hit it, the deeper your fists get stuck.

When *BW* launched its international edition in 1981, two years before *Fortune* did the same thing, the McGraw-Hill flagship magazine was in an enviable position.

The "international" edition was a carbon copy of the U.S. publication, except for the pure gravy of extra ad pages from advertisers wanting foreign circulation only.

This resulted in such curiosities as foreign readers attempting to call "800" telephone numbers originally appearing in ads designed for U.S. readers only, but now also advertised in the "international" edition of *BW*.

Fortune initially tried something similar, and both magazines became so cluttered with ads (only a portion of which made sense to readers outside the U.S.) that each publication was split for the first time into two advertising editions: Domestic and international.

What neither publication counted on was U.S. advertisers who talked a global game but never came across.

"When we offered the international edition and inflated its profile, all of a sudden many advertisers became aware of the fact that it would be easy to buy North America and save a modest amount of money," said Michael Dudler, associate director of the international edition of *Fortune*.

Another problem was that subsidiaries of U.S.-based global companies refused to follow orders from headquarters to buy space in *Fortune*. "There is a resistance to directions out of the U.S.," said Mr. Dudler.

The Economist, rival to both *BW* and *Fortune*, also is hit by this phenomenon of U.S. advertisers opting out of international editions, or letting their foreign subsidiaries make that decision. "Our pricing structure favors the worldwide advertiser," said Sandra Ourusoff, *The Economist's* senior vp in New York.

"They [*BW* and *Fortune*] didn't do their homework," said Filberto Fernandez, an international ad executive with Bank of Boston. "I think they just lifted the publications in the U.S. without being sensitive to cultural differences."

Despite the setbacks, this year for the first time circulation of *Fortune's* international edition—90,000—surpassed the circulation of *Business Week's* edition—81,000.

But the international advertising picture has stayed gloomy, and revenues are flat for both publications this year.

Partly in reaction, both *BW* and *Fortune* have been enticing U.S. advertisers into their international editions with bargain "add-on" rates—discounts for purchases of space in more than one edition.

But those deep discounts are coming down next year.

Fortune's whopping international add-on, which boiled down to a 72% discount for advertisers buying the international edition after paying the full rate to be in the U.S. edition, is going the way of the nickel candy bar.

The add-on for next year will be pegged at 50% off the flat international rate, more in line with the 40% discount available at *BW*.

Steve Klein, a media planner at Grey Advertising, said *Fortune's* international edition has wound up on his schedules simply because the discount was all but a give-away.

On the circulation side, there is some skepticism about the ability of these publications to reach foreign readers.

At a recent New York conference, Lewis Young, former editor of *Business Week*, said, "My experience is that there is a nationalistic pride associated with publications. While we like to talk about international editions of this or that magazine, when you're in Germany, the Germans talk about 'that American publication, *Business Week*.'"

Executives at *Business Week* and *Fortune* insist their international editions are turning a profit, albeit modest ones.

In light of this, *Business Week* and *Fortune* are investing heavily in promotion and beefed-up international editorial coverage.

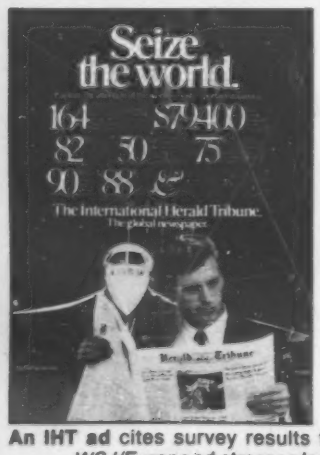
This comes at a time when the strength of the dollar in Europe, the largest market for both publications, is thwarting gains in ad revenues *(see story on Page 61)*.

As these magazines become less reliant on global U.S. advertisers buying off the U.S. dollar rate cards and more on foreign advertisers buying off foreign currency rate cards, the weak foreign currencies have meant poor results when translated into U.S. dollars.

Taking this into consideration, the publications are reexamining their ad rates and taking different tacks. Denis Beran, international publishing director at Business Week, said *BW* next year will increase rates by about 4%.

At *Fortune*, revenues must in-

(Continued on Page 60)



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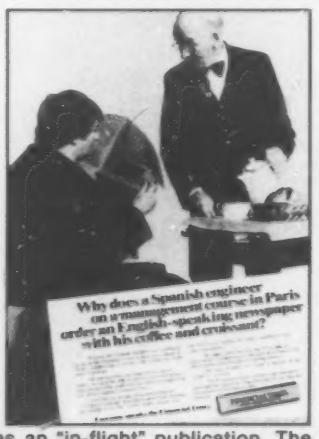
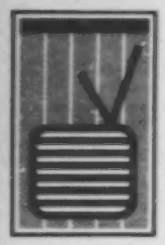

Why does a Spanish engineer on a management course in Paris order an English-speaking newspaper with his coffee and croissant?

An IHT ad cites survey results to play up the newspaper's status as an "in-flight" publication. The *WSJ/Europe* ad stresses local news coverage while the *FT* touts its pan-European readership.

Media giants face off in fight over European ads

By DENNIS CHASE



New York—Battle lines are being drawn in a fierce war for an international media dollar that may be moving to global publications and away from local media.

The battleground is Europe, the slugging probably will start next year and no one is pretending that the fight will be friendly.

In one corner are local newspapers and magazines, published in the language of their countries and reaching impressive shares of their target audiences. These include big European publishers, such as *Frankfurter Allgemeine Zeitung*, the leading West German newspaper, and *Le Monde*, the biggest French newspaper.

In the other corner are "global" publications—all in English and reaching relatively small shares of the same audiences. These include major U.S. publishers—Dow Jones & Co., McGraw-Hill and Time Inc.

At stake is more than $126 million in international media spending (this year's total), or 400% more than 10 years ago. This international advertising pie formerly went completely to local publications, but now is shared with publications that have "global" or pan-regional editions.

Global publishers are offering attractive "add-on" packages in which advertisers buy space in one edition at the full rate and then buy additional space in other regional editions at a discount.

Advertisers also can take advantage of split runs, which allow them to run different ads in different worldwide editions, often at a discount. The issue has come to a head in the last several years with the advent of new international editions of *Business Week* and *Fortune* and with *Wall Street Journal* editions in Europe and Asia.

Urs Wunderli: Global publications pose a threat to local media.

At an international media seminar this fall in Zurich, attended by publishers of both local and global media, "it was all very friendly and polite, but what are we being polite about?" asked an angry Urs Wunderli, president of SFW/PRI International, the largest international publishers representative based in the U.S.

"These [global] guys are trying to take away our business," said Mr. Wunderli, whose company represents *FAZ* and *Le Monde* newspapers and *Der Spiegel* and *L'Expansion* weekly magazines.

Mr. Wunderli and others are complaining that global publications only skim the top of the global business community, yet are gaining advertising revenue.

On the other hand, "purely national advertising is a luxury," said Mike Wilson, *Wall Street Journal* advertising manager for North America. "All the translation and production changes that have to be made from country to country are a waste of time."

How much advertising global publications are taking away from indigenous publications is unclear. Mr. Wunderli conceded that now it is a small amount, for example, only 2% of the total $800 million in annual revenues anticipated by Publicitas this year will be lost to international media. Publicitas is the leading European publishers advertising representative and part owner of SFW/PRI.

But "it's [bad] public relations for our company," Mr. Wunderli said. The worry is that this could snowball into losses of other business, such as market and media research and translation services.

The battle between the local and international sides could kick off in earnest next year. A group of 15 European publishers, who normally meet over cocktails but rarely have any business dealings with one another, are trying to join forces in a unique survey.

This first joint readership survey among indigenous European publications would measure a bigger universe of European readers than any of the existing pan-European surveys—as many as 10 million *(see related story at right).*

Others doubt the survey will ever get off the ground. "It's like the Common Market—these guys are not used to cooperating with one another," said one U.S. foreign media representative.

Publishers of local media agree that their bottom lines have not suffered yet, but "it's a philosophical question," said Luyte Sieders, advertising director for Bonaventura, publisher of *FEM*, the leading Dutch business magazine, and *Elsevier*, the leading newsweekly.

"Global advertisers should first use indigenous media," he said, "and then if there is any money left over, use pan-European media, not the other way around."

Key surveys point to successes and flops

New York—The battle for supremacy between indigenous and international publications is being waged largely around readership surveys.

International publishers say the key regional readership surveys—the Pan-European Survey and the European Businessmen Readership Survey—show that their publications are gaining ground.

But Asian and European publishers say the surveys distort the strength of pan-regional publications and underestimate the strength of local publications.

The latest PES, sponsored this year by *The Economist*, *International Herald Tribune*, *Newsweek*, *Scientific American* and *Time*, covered 7,000 "senior executives and professionals."

It found that *National Geographic* and *Reader's Digest* had the highest "average-issue readership" among international publications in Europe, while the *Wall Street Journal/Europe* had the lowest.

But the survey also found that these publications lagged far behind local publications in individual countries.

For example, in the U.K., the *Sunday Times* reaches 42% of the PES audience, compared with 15.8% for the *Financial Times*, the leading international financial publication in the U.K.

The outcome was the same for this year's EBRS, which more narrowly measures business readers. The *Financial Times* is a leading international publication among businessmen in Europe, with a 16.2% EBRS coverage.

But in one private comparison made for a client by Publicitas, the leading European publishers advertising representative, *The Economist* and *IHT* together reached only 1% of the EBRS audience in West Germany, compared with 56% for *Frankfurter Allgemeine Zeitung*, the leading newspaper.

Local business publications in Europe do far better than international publications in nearly every national survey. In the Netherlands, for example, one survey this year gives the national *Financial Economic Weekly* 13% of the survey's average-issue readership, compared with 3% for *The Economist* and 2% for *Business Week*.

Many contend that the international surveys are biased because they are financed by international media.

"The questionnaires are often adjusted from survey to survey, making it impossible to do comparisons and always benefiting the sponsoring media," said a U.K.-based media consultant.

When some U.S. ad agencies tell their clients that international media are a better buy, "we believe this is not systematically correct. . .for the same paid space" because of the additional reach of national publications, said Jean-Michel Graf, director of Publicitas' international division.

U.S. ad agencies are taking heat from critics of the global media trend. Representatives of indigenous media believe the agencies have few international media experts who truly understand local publications.

Victor Webb, president of Branham International, a media representative for such leading financial publications as *Australian Financial Review* and *Les Echos* in France, believes national publications are not getting a fair hearing because of the slick selling job done by international media.

"The indigenous media are losing by default," Mr. Webb said.

Marketers mixing local and global ads

New York—U.S. global advertisers say global publications are at the fringe—not the heart—of their media buying plans.

"The pan-regional [English-language] publications are really an addition to local media," said Bruce Roberts, Morgan Guaranty vp-advertising.

The bank is spending $2 million this year outside the U.S. on a corporate campaign, and about 33% of that is going to pan-regional publications such as the *International Herald Tribune* and *Wall Street Journal/Europe*.

"Not one penny that we would have spent on local media has been sacrificed," Mr. Roberts said.

Some global advertisers admit that their reasons for choosing global media appear dubious.

"The problem is that many people in the U.S. are not familiar with the [local European] publications," said Nancy Trevino, international marketing communications specialist at Wang Laboratories, Lowell, Mass. "If someone comes to me to talk about, say, a [Spanish-language] computer publication in Latin America, well, a lot of people here don't speak Spanish. So it's a battle."

Last August, Wang launched the biggest international corporate campaign in its history.

In the U.S., the campaign is based on symbols, such as crossed fingers for keeping up service commitments and a wedding ring for Wang's "partnership" with its customers. The campaign is themed "We put people in front of computers."

But in Europe and Australia, the symbols used in the U.S. campaign—created by Hill, Holliday, Connors, Cosmopulos—are replaced with symbols more familiar or acceptable to local customers. For example, in Germany, a "Superman'-type character is used to show that, by adding components, Wang computers can be made increasingly sophisticated. "You should know what your child can become," the ad reads.

The German ads were placed only in local publications.

Wang is not committed to this approach for future campaigns, however. In fact, the current U.S. campaign appears in pan-regional media in Asia, where English is more common than in Europe. The choice in Europe and Australia was strictly "creative-driven," Ms. Trevino said.

A campaign that began last spring for Pittsburgh-based Rockwell International's aerospace, automotive, electronics and general industries businesses is using mostly indigenous general-business newspapers and magazines.

Wang's German ad says: "You should know what your child can become."

The campaign, created by Campbell-Ewald, is themed "Rockwell International technology: It's in everything we do."

"There is no true pan-European publication that addresses top management people in Europe, because you need to speak to people in their own language," said Thomas Haas, Rockwell's manager for advertising.

But even Rockwell is using the *IHT* and *Wall Street Journal/Europe* for its campaign. "We need them to fill in the gaps," Mr. Haas explained.

McDonnell Douglas Corp., St. Louis, has taken a different tack. For the $1.5 million corporate campaign that it kicked off last January, the aerospace company and its agency, J. Walter Thompson USA, have used a mix of local and pan-regional publications, including *The Economist*, *Financial Times* and *Wall Street Journal/Europe*.

The campaign is appearing in 300 publications in 11 languages.

"It's a big world, and influences cross borders," said John Bickers, McDonnell Douglas director of advertising. "Let's face it. There are some powerful local publications you can't ignore."

But to keep up with competitors, Mr. Bickers is forced to use global publications, too.

"If you're playing a basketball game," he said, "you can't afford to give away points."

How to read the chart

The global media chart on Page 51 was compiled from a survey of top media, advertiser and ad agency executives who were asked to name the leading global publications that they felt met the following criteria:

- Substantial mass circulation on at least three continents.
- Worldwide circulation of 50,000 with the circulation of its international editions equaling at least 10% of its domestic edition.
- Editorial content global in scope, and primarily in English.
- Advertising in all editions purchased through one central office. Trade books were not included because they are not mass-circulation publications.

Licensed publications also were excluded because, for the most part, they are not centrally controlled either on the advertising or editorial side.

Advertising Age's global media lineup

	Title/Publisher	Major printing plants for int'l. editions	Paid N. American circulation (6/84)	Paid foreign circulation by region (6/84)	Paid global circulation (6/84)	Cost of worldwide B&W page ($/1985)	Global CPM b&w pg. ($/1985)	Top worldwide advertisers[1] 1984
Dailies	***Financial Times of London*** Financial Times Ltd. London	London Frankfurt	5,816	Europe: 201,610[2] Middle East/Africa: 4,820 Asia/Pacific: 2,796 Latin America: 397 Other: 381	216,400	full: 24,192 qtr: 6,048	111.79	British Telecom American Express Ford BMW British Airways
	International Herald Tribune New York Times & Washington Post	Paris London Zurich Hong Kong Singapore	2,070	Europe: 119,769 Middle East/Africa: 11,146 Asia/Pacific: 24,103 Other: 472	157,560	full: 26,500 qtr: 6,625	168.19	AT&T ITT IBM Pan American Air France
	Wall Street Journal Dow Jones & Co. New York	Hong Kong Singapore Heerlen, Neth.	1,959,873[3]	Asia: 27,727[3] Europe: 25,411	2,013,011	full: 89,049 qtr: 22,262	34.91	Hewlett-Packard[4] AT&T Wang Laboratories Citibank Bankers Trust
Weeklies	***Business Week*** McGraw Hill New York	Philadelphia PA	775,223	Europe: 40,935 Asia: 20,989 Latin America: 17,462 Other: 1,696	856,305	full: 29,720	34.72	Citibank[5] L.M. Ericsson Hewlett-Packard N.V. Philips Rothmans Int'l.
	The Economist The Economist Newspaper London	Singapore London Connecticut	101,253	Europe: 114,709 Asia/Pacific: 19,625 Africa: 6,855 Middle East: 5,923 Central & S. Am.: 4,498	252,863	full: 5,550	21.94	Singapore Airlines Barclays Bank Lufthansa Bankers Trust Pratt & Whitney
	Guardian Weekly Guardian Publications Manchester	Montreal Lincoln (U.K.)	24,569	Europe: 16,782 Asia: 12,188 Africa: 4,002 Latin America: 1,277 Middle East: 1,169	60,455	full: 957	15.82	Tyndall Managers Trenchermans Autoquest Fairlawn Apartments Amnesty International
	Newsweek Newsweek Ltd. New York	Zurich Tokyo Hong Kong Daytona Beach	3,037,277	Atlantic: 302,343 Pacific: 208,299 Latin Am.: 46,091	3,594,010	full: 82,470	19.36	Rupperts/Rothmans[4] British American Tobacco Singapore Airlines L.M. Ericsson Rolex Watch
	Time Time Inc. Publications New York	Toronto Miami, FL Weert, Neth. Melbourne Hong Kong	4,993,066	Atlantic: 525,122 Asia: 242,214 S. Pacific: 140,671 Latin Am.: 100,265	6,001,338	full: 107,358	17.89	British American Tobacco[4] Distillers Co. Singapore Airlines Rolex Watches Nissan Motors
Monthlies	***International Management*** McGraw-Hill Publications Maidenhead, Berkshire England	Singapore St. Gallen, Switz.	———	Europe: 70,440 Asia/Pacific: 30,128 Latin Am.: 30,080 Middle East: 22,086 Africa: 13,137	160,000[6]	full: 15,814	73.93	N.V. Philips Dresdner Bank Lufthansa L.M. Ericsson Combustion Engineering
	National Geographic Nat'l. Geographic Society Washington, D.C.	Corinth, MS	9,018,349	Atlantic: 683,839 Pacific: 377,459 Latin Am.: 90,275 Other: 32,932	10,202,854	full: 107,460	10.59	Canon Cameras AT&T Nikon Inc. Olympus Camera Corp. Nissan Motors
	Reader's Digest Reader's Digest Assn. Pleasantville, N.Y.	26 cities around the world	19,535,000	Atlantic: 7,302,000 Pacific: 2,181,000 Latin Am.: 1,265,000	30,283,000	full: 187,215	6.18	Unilever[4] Toyota Motors Dart & Kraft N.V. Philips Franklin Mint
	Scientific American Scientific American Inc. New York	Chicago IL	554,856	Europe: 65,842 Asia/Pacific: 21,731 Cen. & S. Am.: 6,310 Africa: 2,580 Middle East:1,513	652,832	full: 20,000	30.77	MacDonnell-Douglas Hewlett-Packard Hughes Aircraft AT&T Rolex Watches
	South South Publications Ltd. London	London	7,738	Africa/Middle East: 28,359 Asia/Pacific: 13,763 Europe: 13,472 Latin Am.: 10,573	72,718	full: 2,760	38.33	British Rail Engineering Ltd. British Leyland Combustion Engineering Citibank AT&T
	WorldPaper[7] World Times Inc. Boston	18 countries around the world	———	Latin Am.: 309,000 East Asia: 301,000 Middle East: 119,500 Europe: 26,000	755,500	full: 23,100 qtr: 8,085	30.00	AT&T Pan American Xerox Corp. Overseas Private Inv. Corp. American Express
Other	***Fortune*** Time Inc. Publications New York	Waseca, MN	616,853	Europe: 55,310 Asia: 29,992 Other: 7,748	709,903	full: 25,800	36.85	ITT Singapore Airlines General Foods Matsushita General Motors
	Harvard Business Review Harvard Business Review Boston	Glasgow, KY	211,726	Europe: 12,322 Asia/Pacific: 8,042 Cen. & S. Am.: 3,848 Africa: 2,214 Middle East: 1,496	240,046	full: 6,315	26.31	General Motors Philips Business Systems IBM AT&T Barclays Bank

[1]In all U.S. and international editions.
[2]All circulation figures in category are for June, 1983.
[3]As of September, 1984.
[4]All advertisers in category are for non-U.S. editions.
[5]All advertisers in category are for non-U.S. editions, 1983.
[6]Controlled circulation.
[7]Distributed as a newspaper supplement.
Source: compiled by Advertising Age.

Newspaper Ad Linage

September 1984 vs. September 1983

*AKRON, OH (5)

	1984 Full Run	1984 Part Run	1983 Full Run	1983 Part Run
Beacon Journal (E)	1,450,258	277,481	1,684,543	325,949
Beacon Journal (S)	1,296,108	138,865	921,669	101,168
Grand Total	2,746,366	416,346	2,606,212	427,117

NOTE: Part run figures supplied by publisher to Media Records.

*ATLANTA, GA (8)

Constitution (M)	2,996,224	520,215	3,145,446	674,359
Journal (E)	3,106,983	542,247	3,100,575	599,935
Journal & Constitution (S)	2,842,500	895,227	2,014,465	624,389
Journal & Constitution (Sat)	836,430	——	570,033	——
Grand Total	9,782,137	1,957,689	8,830,519	1,900,683

NOTE: Constitution Morning and Journal Evening published five days a week only.

Constitution Morning, Journal Evening, Journal & Constitution Saturday and Sunday changed from an eight column width (2408 lines per page) to a six column width (1806 lines per page) effective April 30, 1984.

*BALTIMORE, MD (9)

News-American (S)	728,939	41,552	501,174	31,392
News-American (E)	779,466	59,496	943,053	136,380
Sun (M)	2,153,428	43,121	2,205,669	143,713
Sun (E)	1,712,273	43,133	1,972,367	143,713
Sun (S)	3,396,041	108,054	2,415,121	——
Grand Total	8,770,287	295,356	8,037,384	455,198

NOTE: Sun Morning and Sun Evening started publication of a combined Saturday edition effective March 24, 1984. The linage is shown only in the Sun Morning.

News-American Sunday and Evening changed from a nine column (2700 lines per page) width to a six column (1806 lines per page) width, and Sun Morning, Evening and Sunday changed from a nine column (2684 lines per page) width to a six column (1764 lines per page) width effective July 1, 1984.

*BERGEN COUNTY, NJ (9)

Record (E)	2,615,024	302,456	2,791,531	319,274
Record (S)	2,894,109	386,966	2,137,370	411,737
Grand Total	5,509,133	689,422	4,928,901	731,011

NOTE: Record Evening published five days a week only.

Record Evening and Sunday changed from a nine column (2646 lines per page) width to a six column (1764 lines per page) width effective July 1, 1984.

*BOSTON, MA

Herald (M) (T-7)	762,827	——	752,409	——
Herald (S) (T-7)	398,905	442,784	396,383	66,360
Globe (M) (9)	2,630,065	91,550	2,711,299	153,468
Globe (S) (9)	3,900,336	365,464	2,841,188	210,544
Grand Total	7,692,133	899,798	6,701,279	430,372

NOTE: Globe changed from All Day publication to morning publication effective April 2, 1984.

Herald Morning and Sunday changed from a seven column (1400 lines per page) tabloid width, to a five column (980 lines per page) tabloid width effective July 1, 1984. Globe Morning and Sunday changed from a nine column (2700 lines per page) width to a six column (1764 lines per page) width effective July 2, 1984.

BOULDER, CO (6)

Camera (M)	1,957,302	——	2,025,097	——
Camera (S)	1,059,115	——	822,850	——
Grand Total	3,016,417	——	2,847,947	——

NOTE: Figures supplied by publisher to Media Records.

*BUFFALO, NY (6)

News (AD)	1,969,310	260,956	2,159,144	241,840
News (S)	989,599	547,208	829,408	238,760
Grand Total	2,958,909	808,164	2,988,552	480,600

NOTE: News All Day and Sunday changed from a nine column width (2772 lines per page) to a six column width (1848 lines per page) effective May 1, 1984.

*CAMDEN, NJ (6)

Courier-Post (E)	1,878,555	137,260	1,836,946	150,915
Courier-Post (S)	935,705	44,028	713,084	109,372
Grand Total	2,814,260	181,288	2,550,030	260,287

NOTE: Courier-Post Evening and Sunday changed from a six column (1800 lines per page) width to a six column (1806 lines per page) width effective May 1, 1984.

CHARLOTTE, NC (6)

News (E)	1,072,280	——	1,156,731	——
Observer (M)	1,781,523	473,771	1,678,933	514,533
Observer (S)	1,312,041	716,216	985,844	357,450
Grand Total	4,165,844	1,189,987	3,821,508	871,983

NOTE: News Evening published five days a week only.

*CHICAGO, IL

Tribune (Ad) (6)	2,232,019	2,558,856	2,023,522	1,712,604
Tribune (S) (6)	2,477,443	1,115,481	1,689,425	728,556
Sun-Times (M) (T-7)	2,072,616	856,473	2,570,836	748,306
Sun-Times (S) (T-7)	975,209	699,523	730,237	445,311
Grand Total	7,757,287	5,230,333	7,014,020	3,634,777

NOTE: Sun Times Morning and Sunday changed from a six column (1200 lines per page) width tabloid to a five column (980 lines per page) width tabloid effective July 2, 1984.

*CINCINNATI, OH (6)

Enquirer (M)	2,366,190	95,344	2,296,401	168,344
Enquirer (S)	2,170,966	56,840	1,592,916	87,632
Post (E)	956,605	377,416	917,198	128,308
Grand Total	5,453,761	529,600	4,806,515	384,284

NOTE: Enquirer Morning and Sunday and Post Evening changed from a six column (1800 lines per page) width to a six column (1806 lines per page) width effective July 1, 1984.

*CLEVELAND, OH (9)

Plain Dealer (M)	2,635,655	393,572	2,998,801	422,393
Plain Dealer (S)	2,198,066	82,065	1,641,541	88,503
Grand Total	4,833,721	475,640	4,640,342	510,896

NOTE: Plain Dealer Morning and Sunday changed from a nine column (2700 lines per page) width to a six column (1806 lines per page) width effective July 1, 1984.

*DALLAS, TX (9)

News (M)	6,129,964	279,011	5,738,368	349,834
News (S)	3,961,788	264,841	2,727,328	262,505
Times-Herald (AD)	5,502,374	196,242	4,802,412	194,306
Times-Herald (S)	2,986,406	531,081	2,147,886	438,135
Grand Total	18,580,532	1,271,175	15,415,994	1,244,780

NOTE: News Morning and Sunday changed from a nine column (2700 lines per page) width to a six column (1764 lines per page) width, and Times Herald All Day and Sunday changed from a nine column (2709 lines per page) width to a six column (1806 lines per page) width effective July 1, 1984.

*DENVER, CO

Rocky Mt. News (M) (T-7)	5,355,647	23,189	5,625,245	1,984
Rocky Mt. News (S) (T-7)	1,837,963	——	1,148,317	51,720
Post (M) (9)	3,361,938	157,270	3,499,199	163,035
Post (S) (9)	2,658,427	44,040	2,254,921	14,472
Grand Total	13,213,975	224,499	12,527,682	231,211

NOTE: Rocky Mountain News Morning and Sunday changed from a seven column (1365 lines per page) width tabloid to a five column (980 lines per page) width tabloid, and Post Morning and Sunday changed from a nine column (2772 lines per page) width to a six column (1848 lines per page) width effective July 1, 1984.

*DETROIT, MI (9)

Free Press (M)	1,813,676	518,425	1,989,970	1,079,030
Free Press (S)	915,682	334,193	719,064	234,639
News (AD)	2,476,476	494,385	2,555,236	499,663
News (S)	1,942,453	299,218	1,407,303	189,972
Grand Total	7,148,287	1,646,221	6,671,573	2,003,304

NOTE: Free Press Morning and Sunday changed from a nine column (2736 lines per page) width to a six column (1830 lines per page) width, and News All Day and Sunday changed from a nine column (2808 lines per page) width to a six column (1872 lines per page) width effective July 1, 1984.

*ERIE, PA (9)

Times (E)	1,238,581	7,296	1,197,324	4,704
Times-News (S)	1,275,184	186,680	965,419	40,536
Grand Total	2,513,765	193,976	2,162,743	45,240

NOTE: Times Evening and Times-News Sunday changed from a nine column (2709 lines per page) width to a six column (1806 lines per page) width effective April 1, 1984.

FORT LAUDERDALE, FL (6)

News & Sun Sentinel (S)	1,916,562	——	——	——
Sun Sentinel (M)	4,132,887	——	——	——
Grand Total	6,049,449	——	——	——

NOTE: 1983 figures not available.

*FORT WAYNE, IN (9)

Journal Gazette (M)	1,251,490	——	1,336,197	——
Journal Gazette (S)	1,188,559	——	787,711	——
News Sentinel (E)	1,490,149	——	1,592,979	——
Grand Total	3,930,198	——	3,716,887	——

NOTE: Journal Gazette Morning and Sunday and News Sentinel Evening changed from a nine column (2790 lines per page) width to a six column (1848 lines per page) width effective July 1, 1984. Part run figures not available.

FORT WORTH, TX (6)

Star-Telegram (M)	4,166,260	1,034,516	2,817,332	507,822
Star-Telegram (E)	2,935,366	769,356	2,189,516	542,612
Star-Telegram (S)	2,748,200	822,794	1,370,992	297,320
Grand Total	9,849,826	2,626,666	6,377,840	1,346,354

NOTE: Figures supplied by publisher to Media Records. Star-Telegram Morning, Evening and Sunday changed from a nine column width (2709 lines per page) to a six column width (1806 lines per page) effective July 1, 1984.

GARY, IN (6)

Post Tribune (E)	1,231,314	294,952	1,217,076	298,396
Post Tribune (S)	397,866	96,488	371,434	70,812
Grand Total	1,629,180	391,440	1,588,510	369,208

NOTE: Figures supplied by publisher to Media Records.

*GREENWICH/STAMFORD, CT (9)

Time (E)	1,427,925	——	1,386,367	——
Time (S)	987,780	——	628,368	——
Advocate (E)	1,122,526	6,816	1,884,195	14,640
Advocate (S)	1,025,377	——	672,118	——
Grand Total	5,163,608	6,816	4,571,068	14,640

NOTE: Time Evening and Sunday and Advocate Evening and Sunday changed from a nine column width (2700 lines per page) to a six column width (1806 lines per page) effective August 1, 1984.

*HARTFORD, CT (9)

Courant (M)	2,587,350	517,619	2,694,879	520,627
Courant (S)	1,943,747	1,791,922	1,312,050	924,230
Grand Total	4,531,097	2,309,541	4,006,929	1,444,857

NOTE: Courant Morning and Sunday changed from a nine column (2700 lines per page) width to a six column (1806 lines per page) width effective July 1, 1984.

*HONOLULU, HI (9)

Advertiser (M)	2,232,862	——	2,471,618	——
Star-Bulletin (E)	2,071,164	——	2,349,028	——
Star-Bulletin & Advertiser (S)	1,632,471	——	1,304,746	——
Grand Total	5,936,497	——	6,125,392	——

NOTE: Advertiser Morning, Star-Bulletin Evening, and Star-Bulletin & Advertiser Sunday changed from a nine column (2709 lines per page) width to a six column (1806 lines per page) width effective July 1, 1984.

*HOUSTON, TX (9)

Chronicle (AD)	5,994,172	498,062	7,816,667	460,239
Chronicle (S)	3,229,518	552,429	2,549,667	304,122
Post (M)	3,998,899	555,388	5,555,518	432,655
Post (S)	1,763,785	368,276	1,434,987	348,648
Grand Total	14,986,374	1,974,155	17,357,039	1,545,664

NOTE: Chronicle All Day and Sunday changed from a nine column (2700 lines per page) width to a six column (1806 lines per page) width effective July 2, 1984, and Post Morning and Sunday changed from a nine column width (2655 lines per page) to a six column width (1764 lines per page) effective July 1, 1984.

*LONG BEACH, CA (8)

Press Telegram (M)	1,935,681	469,924	2,031,028	487,158
Press Telegram (S)	1,102,724	50,960	744,545	83,076
Grand Total	3,038,405	520,884	2,775,573	570,234

NOTE: Press Telegram Morning and Sunday changed from an eight column width (2408 lines per page) to a six column width (1806 lines per page) effective July 1, 1984. Part run figures supplied by publisher to Media Records.

LONG ISLAND, NY (T-6)

Newsday (E)	3,027,175	683,058	2,994,766	817,158
Newsday (S)	2,075,390	1,154,751	1,599,724	1,078,984
Grand Total	5,102,565	1,837,809	4,594,490	1,896,142

*LOS ANGELES, CA (8)

Times (M)	5,060,259	3,805,110	5,425,748	3,547,946
Times (S)	3,598,478	1,781,923	2,597,491	1,249,901
Herald-Examiner (M)	901,358	205,934	873,578	260,751
Herald-Examiner (S)	309,434	109,090	255,132	69,357
Grand Total	9,869,529	5,902,057	9,151,949	5,127,955

NOTE: Times Morning and Sunday changed from an eight column width (2400 lines per page) to a six column width (1806 lines per page) effective July 2, 1984, and Herald-Examiner Morning and Sunday changed from an eight column width (2240 lines per page) to a six column width (1680 lines per page) effective July 1, 1984.

*LOS ANGELES/SAN FERNANDO VALLEY, CA (8)

News (M)	3,027,936	358,723	3,015,705	648,623
News (S)	1,582,356	82,732	994,408	128,584
Grand Total	4,610,292	441,455	4,010,113	777,207

NOTE: News Morning and Sunday changed from an eight column width (2400 lines per page) to a six column width (1764 lines per page) effective July 2, 1984.

LOS ANGELES/TORRANCE, CA (8)

Breeze (E)	2,006,214	——	1,984,626	——
Breeze (S)	1,046,920	——	626,976	——
Grand Total	3,053,134	——	2,611,602	——

NOTE: Figures supplied by publisher to Media Records.
Breeze Evening and Sunday changed from an eight column (2408 lines per page) width to a six column width (1806 lines per page) effective July 1, 1984.

LOUISVILLE, KY (6)

Courier Journal (M)	1,545,768	267,316	1,623,580	289,896
Times (E)	1,451,590	506,856	1,542,198	483,896
Courier Journal (S)	2,137,688	10,374	1,568,616	3,780
Grand Total	5,135,046	784,546	4,734,394	777,574

NOTE: Figures supplied by publisher to Media Records.

MACON, GA (6)

Telegraph & News (M)	923,370	306,908	834,484	303,478
Telegraph & News (S)	724,332	284,242	518,924	95,354
Grand Total	1,647,702	591,150	1,353,408	398,832

NOTE: Figures supplied by publisher to Media Records. 1983 figures are converted to a six column format as supplied by publisher.
Telegraph & News Morning and Sunday changed from an eight column width (2408 lines per page) to a six column width (1806 lines per page) effective July 1, 1984. Telegraph Morning and News Evening combined into one Morning publication the Telegraph & News effective September 6, 1983.

MIAMI, FL (6)

Herald (M)	2,408,016	——	2,526,843	——
Herald (S)	1,765,318	——	1,362,665	——
News (E)	1,044,756	——	1,130,125	——
Grand Total	5,218,090	——	5,019,633	——

NOTE: Part run figures not available.

MINNEAPOLIS, MN (6)

Star & Tribune (AD & Sat)	2,025,960	336,593	2,041,648	168,938
Star & Tribune (S)	2,637,767	31,184	1,899,982	4,704
Grand Total	4,663,727	367,777	3,941,630	173,642

NOTE: 1983 figures supplied by publisher to Media Records. 1983 part run daily is TMC and Community linage only. 1983 part run Sunday is Country linage only.

*NASHVILLE, TN (6)

Banner (E)	1,421,039	449,044	1,442,138	327,356
Tennessean (M)	1,449,297	448,742	1,468,410	335,756
Tennessean (S)	1,384,338	389,000	977,781	185,796
Grand Total	4,254,674	1,286,786	3,888,329	848,908

NOTE: Banner Evening and Tennessean Morning and Sunday changed from a six column (1800 lines per page) format to a six column (1806 lines per page) format effective July 1, 1984.

*NEW YORK, NY

Times (M) (9)	3,057,954	284,814	3,417,788	287,571
Times (S) (9)	4,403,089	2,034,708	3,244,757	1,883,639
News (M) (T-6)	1,050,882	1,715,042	1,294,444	1,533,283
News (S) (T-6)	681,142	1,539,268	549,981	1,218,585
Post (AD) (T-7)	1,018,814	——	1,121,731	——
Grand Total	10,211,881	5,573,832	9,628,701	4,923,078

NOTE: Times Morning and Sunday changed from a nine column width (2700 lines per page) to a six column width (1764 lines per page). News morning and Sunday changed from a six column width tabloid (1200 lines per page) to a six column width tabloid (1176 lines per page), and Post All Day changed from a seven column width tabloid (1400 lines per page) to a five column width tabloid (980 lines per page) effective July 2, 1984.

*NEWARK, NJ (9)

Star Ledger (M)	3,912,652	96,341	3,897,559	114,800
Star Ledger (S)	3,993,020	464,256	2,808,924	323,408
Grand Total	7,905,672	560,597	6,706,483	438,208

NOTE: Star Ledger Morning and Sunday changed from a nine column (2835 lines per page) format to a six column (1788 lines per page) format effective July 1, 1984.

*OAKLAND, CA (8)

Tribune (M)	1,555,097	672,587	1,664,977	222,653
Tribune (S)	1,025,473	434,092	836,721	304,488
Grand Total	2,580,570	1,106,679	2,501,698	527,141

NOTE: Tribune Morning and Sunday changed from an eight column width (2408 lines per page) to a six column width (1806 lines per page) effective July 2, 1984.

*ORANGE COUNTY, CA (8)

Register (AD)	5,080,265	984,986	5,064,399	763,736
Register (S)	2,516,117	127,976	1,806,239	37,200
Grand Total	7,596,382	1,112,962	6,870,638	800,936

NOTE: Register All Day and Sunday changed from an eight column width (2408 lines per page) to a six column width (1806 lines per page) effective July 1, 1984.

*ORLANDO, FL (8)

Sentinel (AD)	3,299,490	258,813	3,157,866	253,332
Sentinel (S)	1,400,886	540,696	1,095,784	195,288
Grand Total	4,700,376	799,509	4,253,650	448,620

NOTE: Sentinel All Day and Sunday changed from an eight column width (2352 lines per page) to a six column width (1764 lines per page) effective July 1, 1984. Part run totals do not include County Sentinel and Sentinel Bonus linage.

*PHILADELPHIA, PA

Inquirer (M) (6)	2,250,471	729,649	2,323,368	706,212
Inquirer (S) (6)	2,389,904	711,817	1,745,233	417,748
News (E) (T-5)	1,163,350	38,652	1,243,148	36,408
Grand Total	5,803,725	1,480,118	5,311,749	1,160,368

NOTE: Inquirer Morning and Sunday changed from a six column (1860 lines per page) width to a six column (1872 lines per page) width effective January 1, 1984.

*PHOENIX, AZ (6)

Arizona Republic (M)	4,260,578	154,140	3,905,256	137,522
Arizona Republic (S)	2,670,234	——	2,180,262	——
Gazette (E)	4,138,232	156,128	3,793,356	139,454
Grand Total	11,069,044	310,268	9,878,876	276,976

NOTE: Figures supplied by publisher to Media Records.

PORTLAND, OR (6)

Oregonian (AD&S)	4,512,914	——	3,939,978	——
Grand Total	4,512,914	——	3,939,978	——

NOTE: Figures supplied by publisher to Media Records. 1983 figures are converted to a six column format as supplied by publisher.
Oregonian All Day and Sunday changed from a nine column width (2709 lines per page) to a six column width (1806 lines per page) effective July 1, 1984.

*PROVIDENCE, RI (6)

Bulletin (E)	1,342,642	721,994	1,248,282	480,312
Journal (M)	1,525,216	469,714	1,420,888	250,908
Journal (S)	1,690,864	384,468	1,454,306	182,784
Grand Total	4,558,722	1,576,176	4,123,476	914,004

NOTE: Bulletin Evening and Journal Morning have a combined Saturday edition. The linage is shown only in the Journal Morning.

Bulletin Evening and Journal Morning and Sunday changed from a nine column (2700 lines per page) width to a six column (1806 lines per page) width effective July 1, 1984. Figures supplied by publisher to Media Records. 1983 figures are converted to a six column format as supplied by publisher.

*ROCHESTER, NY (9)

Democrat & Chronicle (M)	1,766,313	150,313	1,652,101	293,355
Democrat & Chronicle (S)	1,491,464	261,868	1,123,316	140,404
Times Union (E)	1,417,252	193,081	1,456,453	223,671
Grand Total	4,675,029	605,262	4,231,870	657,430

NOTE: Democrat & Chronicle Morning and Sunday and Times Union Evening changed from a nine column width (2700 lines per page) to a six column width (1806 lines per page) format effective June 25, 1984.

Note: Times Union evening published five days a week only.

SACRAMENTO, CA (9)

Bee (M&S)	6,492,702	287,651	7,058,856	——
Grand Total	6,492,702	287,651	7,058,856	——

NOTE: 1983 figures supplied by publisher to Media Records.

Bee Morning and Sunday changed from a nine column (2646 lines per page) width to a six column (1764 lines per page) width effective July 1, 1984.

ST. LOUIS, MO (6)

Post Dispatch (M)	2,407,466	646,611	1,705,898	216,048
Post Dispatch (S)	3,119,015	——	2,029,982	——
Grand Total	5,526,481	646,611	3,735,880	216,048

NOTE: Figures supplied by publisher to Media Records.

Post Dispatch changed from Evening publication to Morning publication effective February 27, 1984.

*ST. PAUL, MN (6)

Pioneer Press (M)	1,290,394	——	1,307,039	——
Pioneer Press (S)	1,821,048	——	1,346,639	——
Dispatch (E)	1,209,205	——	1,337,914	——
Grand Total	4,320,647	——	3,991,392	——

NOTE: Pioneer Press Morning and Sunday and Dispatch Evening changed from a six column (1782 lines per page) format to a six column (1764 lines per page) format effective July 1, 1984.

Note: Pioneer Press Morning and Dispatch Evening have a combined Saturday edition. The linage is shown only in the Dispatch evening. Part run figures not available.

*SAN ANTONIO, TX (9)

Express-News (AD)	2,293,699	323,364	2,653,474	296,744
Express-News (S)	1,888,934	373,708	1,347,330	302,412
Express-News (Sat)	1,039,341	——	762,609	——
News (E)	419,336	60,660	2,245,236	255,344
Light (E)	2,198,905	436,390	2,418,068	410,425
Light (S)	1,781,555	529,595	1,309,886	319,538
Light (Sat)	893,974	——	594,754	——
Grand Total	10,515,744	1,725,717	11,331,357	1,584,463

NOTE: Express Morning, Express-News Sunday and Saturday, News Evening and Light Evening. Sunday and Saturday changed from a nine column width (2709 lines per page) to a six column width (1806 lines per page) effective June 1, 1984. Express Morning and News Evening combined to one edition, Express-News All Day effective September 10, 1984. The Express Morning linage is reported in the Express-News All Day listing.

Prior to September 10, 1984, Express Morning and News Evening published five days a week only. Light Evening published five days a week only.

*SAN DIEGO, CA (8)

Union (M)	3,617,466	155,670	3,682,256	370,594
Union (S)	2,445,227	——	1,607,205	138,480
Tribune (E)	3,646,255	148,719	3,793,245	397,710
Grand Total	9,708,948	304,389	9,082,706	807,184

NOTE: Union Morning and Sunday and Tribune Evening changed from an eight column (2408 lines per page) width to a six column (1806 lines per page) width effective July 2, 1984.

*SAN FRANCISCO, CA (8)

Chronicle (M)	2,379,142	753,531	2,497,681	906,419
Examiner (E)	2,314,796	750,070	2,439,953	902,581
Examiner & Chronicle (S)	1,553,391	733,600	1,152,324	462,232
Grand Total	6,257,329	2,237,201	6,089,958	2,271,232

NOTE: Chronicle Morning, Examiner Evening and Examiner & Chronicle Sunday changed from an eight column width (2408 lines per page) to a six column width (1806 lines per page) effective July 2, 1984.

*SAN JOSE, CA (8)

Mercury News (AD)	5,164,298	516,257	5,029,026	678,659
Mercury News (S)	3,039,376	——	2,166,197	——
Grand Total	8,203,674	516,257	7,195,223	678,659

NOTE: Mercury News All Day and Sunday changed from an eight column width (2408 lines per page) to a six column width (1788 lines per page) effective July 1, 1984.

*SHREVEPORT, LA (9)

Journal (E)	1,424,723	92,960	1,448,736	97,072
Times (M)	1,940,372	224,852	1,921,339	138,512
Times (S)	1,421,199	118,852	1,064,459	49,432
Grand Total	4,786,294	436,664	4,434,534	285,016

NOTE: Journal Evening and Times Morning and Sunday changed from a nine column (2709 lines per page) width to a six column (1806 lines per page) width effective April 30, 1984.

STATE COLLEGE, PA (6)

Centre Times (E)	924,420	54,180	1,012,158	70,588
Centre Times (S)	536,620	——	375,802	——
Grand Total	1,461,040	54,180	1,387,960	70,588

NOTE: Figures supplied by publisher to Media Records.

*SYRACUSE, NY (9)

Herald Journal (E)	1,634,143	292,776	1,852,559	187,570
Herald American (S)	1,178,171	531,441	973,224	150,240
Post-Standard (M)	1,379,705	395,333	1,453,558	315,489
Grand Total	4,192,019	1,219,550	4,279,341	653,299

NOTE: Herald Journal Evening, Herald American Sunday, and Post Standard Morning changed from a nine column (2727 lines per page) width to a six column (1806 lines per page) width effective July 1, 1984.

TAMPA, FL (9)

Tribune (AD)	3,526,433	1,627,877	3,665,691	1,039,363
Tribune (S)	2,642,365	11,344	1,788,188	——
Grand Total	6,168,798	1,639,221	5,453,879	1,039,363

NOTE: Figures supplied by publisher to Media Records. Comics linage is not included.
Tribune All Day and Sunday changed from a nine column (2835 lines per page) width to a six column (1890 lines per page) width effective July 1, 1984.

TOLEDO, OH (6)

Blade (E)	1,309,000	——	1,325,128	——
Blade (S)	1,273,286	——	891,646	——
Grand Total	2,582,286	——	2,216,774	——

NOTE: Figures supplied by publisher to Media Records.
Blade Evening and Sunday changed from a nine column width (2772 lines per page) to a six column width (1848 lines per page) effective April 2, 1984.

TORONTO, CANADA

Sun (M) (T-6)	1,748,359	33,756	1,928,051	9,120
Sun (S) (T-6)	868,870	60,624	585,468	——
Globe & Mail (M) (9)	2,930,570	255,713	2,628,743	258,623
Grand Total	5,547,799	350,093	5,115,262	294,743

*WASHINGTON, DC (9)

Post (M)	5,419,101	438,848	5,489,127	631,798
Post (S)	3,082,858	596,940	2,438,635	326,484
Grand Total	8,501,959	1,035,788	7,927,762	958,282

NOTE: Post Morning and Sunday changed from a nine column (2781 lines per page) width to a six column (1848 lines per page) width effective July 1, 1984.

Alexandria Journal (M)	1,091,702	——	991,140	——
Prince George's Journal (M)	1,020,425	——	941,841	18,720
Montgomery Journal (M)	1,028,335	——	950,365	——
Fairfax Journal (M)	1,134,800	——	1,029,489	4,320
Arlington Journal (M)	1,098,921	——	1,006,194	——

NOTE: Alexandria Journal Morning, Prince George's Journal Morning, Montgomery Journal Morning, Fairfax Journal Morning, and Arlington Journal Morning published five days a week only, and changed from a nine column (2709 lines per page) width to a six column (1806 lines per page) width effective July 2, 1984.

WEST PALM BEACH, FL (6)

Post (M)	2,686,754	365,876	2,641,240	372,218
Times (E)	2,083,382	34,560	2,081,422	10,766
Post (S)	1,882,720	157,500	1,406,818	106,932
Grand Total	6,652,856	557,956	6,129,480	489,916

NOTE: Figures supplied by publisher to Media Records.
Times evening published five days a week only.

*WESTCHESTER ROCKLAND, NY (8)

Reporter Dispatch (E)	1,235,140	184,489	1,491,848	188,148
Reporter Dispatch (S)	1,272,085	236,320	994,359	255,720
Grand Total	2,507,225	420,809	2,486,207	443,868

NOTE: Reporter Dispatch Evening and Sunday changed from an eight column width (2400 lines per page) to a six column width (1806 lines per page) effective June 25, 1984.

WICHITA, KS (6)

Eagle-Beacon (M)	1,655,110	——	1,767,741	——
Eagle-Beacon (S)	1,356,224	——	912,771	——
Grand Total	3,011,334	——	2,680,512	——

NOTE: Part run figures not available.

NOTE: Figures in Parenthesis Denote Reported Newspaper Column Format. For example: (6)—Six Column Broadsheet, (T-7)—Seven Column Tabloid.

Source: Media Records

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CONVERSION METHODOLOGY

Due to the introduction of the SAU 6 column format, Media Records applies the following conversion methodology to report comparable figures (1984 month vs. 1983 data) for newspapers that changed column formats in 1984. These newspapers are indicated with an asterisk (*).

7 column tabloids which have adopted a 5 column tabloid format are converted back to the original 7 column formats.

8 column broadsheet standards which have adopted a 6 column broadsheet standard format are converted back to the original 8 column formats.

9 column broadsheet standards which have adopted a 6 column broadsheet standard format are converted back to the original 9 column formats.

6 column broadsheet standards or tabloids which have a slight depth change in 1984 but did not change column format are converted back to original depth.

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